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ABSTRACT

Australia's accommodation, cafes, and restaurants industry represents more than half of the nation's total tourism and hospitality employment. It accounts for roughly 4.5% of all jobs in Australia (400,000 workers). Since 1987, the number of jobs in the sector has risen from about 257,000 to about 372,000. Approximately 57% of employees are females; about 43% of industry jobs are part time. The majority of enterprises in this sector are small businesses. Employers in this industry spent less on training their employees in 1996 than any other industry. Only 10% of these employers provided training. Employers are less satisfied with vocational education and training (VET) than those in any other industry sector. Within the last 3 years, it has become the fifth largest industry employing apprentices and trainees. Nearly two-thirds of the work force in this sector have no qualifications beyond high school. Almost two-thirds of employers believe there is an adequate supply of VET graduates to meet demand. (An appendix contains four tables of statistics: national shifts in employment in various industries in Australia; numbers of persons employed in various occupations in the accommodation, cafes, and restaurants industry from 1987-1996; and educational attainment of persons in occupations within the industry.) (KC)

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Industry training monograph

NCVER

Accommodation, cafés and restaurants

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Accommodation, cafés and restaurants

1998

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Preface

THE ACCOMMODATION, CAFÉS and restaurants industry training monograph is one of a series of monographs which has been designed to provide readers with an overview of occupational trends and the current training effort in each industry in Australia.

The monograph analyses data at the major Australian and New Zealand Standard Industry Classification (ANZSIC) industry division level, given that it is at this level most data are collected and disseminated. The monograph addresses:

- recent employment trends
- recent occupational trends in key skills areas
- current training arrangements, particularly training levels and outputs

The monographs bring together for the first time a range of survey data from the Australian Bureau of Statistics (ABS), together with graduate destination, employer satisfaction with training and other training data compiled for the Australian National Training Authority (ANTA) by the National Centre for Vocational Education Research (NCVER).

I would like to thank Tom Dumbrell for preparing these monographs and I would also like to acknowledge John Ray's contribution to the analysis of employment and occupation data.

NCVER acknowledges ANTA's significant contribution to the cost of this monograph in sponsoring its publication.

I hope that the material in this publication will be of interest to Australia's vocational, education and training (VET) sector. In particular the document is designed for industry decision-makers, policy-makers, teachers and trainers, researchers and students with an interest in VET.

Readers who are interested in more information about training markets or other areas of VET research are referred to the NCVER's research database, VOCED. Printed and diskette versions of VOCED can be obtained from NCVER (ph +61 8 8333 8400) or it can be accessed directly on the world wide web at the following address:

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Chris Robinson, National Centre for Vocational Education and Research Ltd

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The accommodation, cafés and restaurants industry in Australia

Overview

THE ACCOMMODATION, CAFÉS and restaurants industry in Australia, which represents more than half Australia's total tourism and hospitality related employment, is one of the middle-sized employment sectors. The accommodation, cafés and restaurants sector accounts for roughly 4.5% of all jobs in Australia.[1] As a whole, the tourism industry accounts for about 7.4% of expenditure on gross domestic product (GDP) in Australia and generated around $16 billion in export earnings in 1996–1997.

Over the last decade, accommodation, cafés and restaurants has been one of the fastest growing areas of employment throughout Australia. Since 1987 the number of jobs in the sector has risen from about 257 000 to about 372 000 in 1996, or by around 115 000. By early 1997 there were more than 400 000 people employed in the area. The accommodation sub-sector accounted for about 81 000 jobs as at June 1996. Looked at in another way, this represents average annual growth over the decade of 4.3%, second only to the property and business services sector. Over the decade, employment across all industries grew at an annual average rate of 1.8%.

The industry employs more females than males. Roughly 57% of employees are females and the industry is also a significant source of casual and part-time jobs. About 43% of jobs in the industry are part time, while Tourism Training Australia has estimated that more than 50% of hospitality jobs are casual.

Labour costs in this sector are the lowest of all industry divisions in Australia. In 1993–1994 total labour costs per employee were $18 560, while average earnings per employee were $16 883, reflecting the predominance of part-time and casual employment.

Small businesses make up the vast majority of the 28 500 business enterprises in this sector. The main occupations found in the sector are miscellaneous salespersons, food tradespersons and managing salespersons.

[1] Australian Bureau of Statistics (ABS), *Labour force, Australia*, cat.6203.0, November 1997

Employers in the accommodation, cafés and restaurants industry spent less on training their employees in 1996 than any other industry. Expenditure on structured training, as revealed in the Australian Bureau of Statistics (ABS) employer training expenditure survey for July to September 1996 was $54.51 per employee. Only 10% of employers in the sector provided training, again the lowest proportion of all industries.

In the survey on employer satisfaction with vocational education and training for 1997 (ESS), compiled by the National Centre for Vocational Education Research (NCVER), the accommodation, cafés and restaurants industry recorded the lowest rate of satisfaction with vocational education and training (VET) of all industry sectors.

In the technical and further education (TAFE) graduate destination survey for 1997 (GDS), also compiled by NCVER, 7% of employed graduates surveyed were working in the industry, similar to the 6.8% recorded in the 1995 survey. Graduates' perceptions of the relevance of their course were at the lower end of the scale, with almost 29% regarding their course as of little or no relevance to their employment.

In interpreting these results it is important to keep in mind that, overall, persons employed full time were much more likely to rate their courses as relevant. Therefore, the low level of full-time employment in this sector might be a factor in this low rating, as almost half of the surveyed students in the industry were working part time. TAFE graduates working in this industry, who were not employed before the course (together with those in the education sector), were more likely to be working part time than those employed in any other industry.

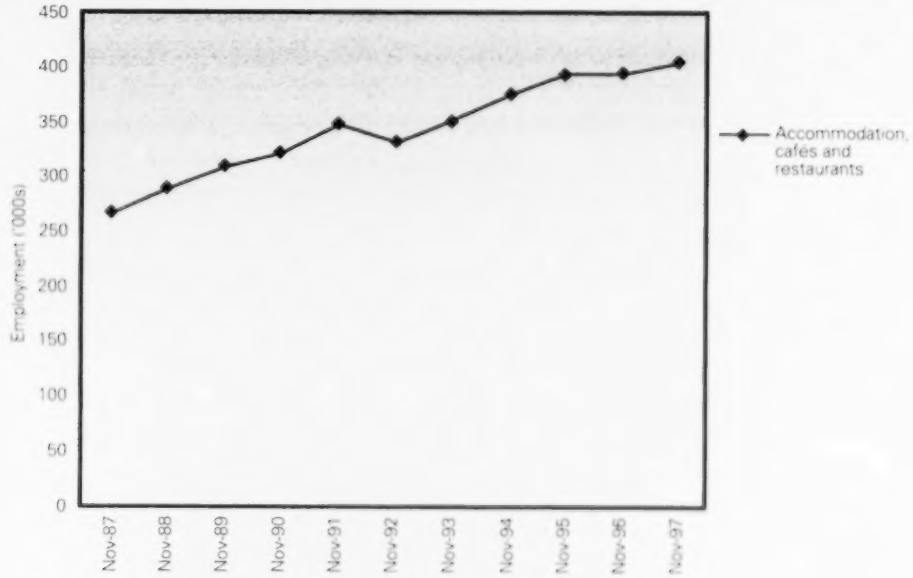
Most graduates surveyed had obtained a certificate (other), an Australian Qualification Framework (AQF) level II certificate, a trade certificate or an associate diploma. Of the graduates who were employed in the accommodation, cafés and restaurants industry during their final semester of study, 37% received some form of financial assistance from their employer, among the lowest levels of employer support out of all industry sectors for comparable graduates.

Apprenticeships and traineeships in the industry have grown strongly over the last three years to become the fifth largest industry employing apprentices and trainees.

Employment in the industry has, as noted above, grown strongly over the last decade. Despite the significance of Asia as a source of tourists to Australia and the current economic difficulties being experienced in a number of Asian countries, the long-term forecasts for visitor arrivals still show strong growth in total tourism although at lower rates than were being forecast a year ago.

Chart 8.1 shows the employment growth trend experienced by the industry over the period 1987 to 1997. It reveals that over that period the industry enjoyed almost continuous growth, rising from 266 700 persons employed in 1987 to 402 700 in November 1997.

Chart 8.1: Employment in accommodation, cafés and restaurants industry, Australia, 1987–1997 (ABS labour force survey)



Source: ABS, *Labour force, Australia*, cat.6203.0, 1987–1997

An industry snapshot

With about 400 000 employees, this industry represents about 4.5% of all employment in Australia. The accommodation, cafés and restaurants industry accounts for about 58% of the estimated 694 000 jobs in the unofficial 'tourism' sector.[2] In 1994–1995 there were 28 500 businesses in accommodation, cafés and restaurants across Australia, of which 25 400 were classified as small businesses. According to the Industry Commission, about 80% of establishments in the accommodation, cafés and restaurants industry in 1994 employed fewer than ten persons.

The tourism sector accounts for 7.4% of Australia's GDP, plus a further 4.3% of GDP indirectly. International tourism represents about 25% of the total tourism industry in Australia. In 1995–1996 expenditure derived from domestic tourism amounted to $41.9 billion, while an additional $4.6 billion was spent domestically by outbound tourists. International tourism generated export earnings of $16 billion in 1996–1997, or 13.7% of total Australian export earnings.

Forecasts of growth in the tourism industry indicate an expectation of annual growth in international tourism of between 3.6% and 6.1%, and domestic tourism growth of 1.9% per year. In 1996 half of the international tourists visiting Australia came from Asia, with the major source countries being Japan, Korea and Singapore. The large reductions in the value of Asian currencies over recent months will, without

[2] Readers seeking detailed information on the 'tourism' industry are referred to the Industry Commission final report *Tourism accommodation and training*, April 1996

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doubt, have an impact on the growth in tourism over the next few years. It is important, nevertheless, to keep in mind that the Asian market represents half of the international market, which, itself, is 25% of the total tourism industry.

The most pessimistic industry forecasts see the Asian currency crisis as slowing industry growth, not reversing this positive growth.[3] The impact of the decline in the growth in Asian tourism will not impact equally on a regional basis throughout Australia. Recent forecasts indicate that Western Australia is more likely to be adversely affected than elsewhere in Australia because of its greater reliance on Asian tourists from those Asian countries most adversely affected by the currency crisis.

Investment in hotels and motels in Australia has shown strong growth over the last five years. In 1992–1993 the value of work done in hotel and similar construction amounted to $272 million. By 1996–1997 this had risen to $997 million. This figure is forecast to rise to $1240 million in 1997–1998.

Employment characteristics of the industry

The accommodation, cafés and restaurants industry is comprised of four areas:

i accommodation (hotels and motels)

ii pubs, taverns and bars

iii cafés and restaurants

iv clubs

Among these, the largest employment sector is cafés and restaurants.

Accommodation, cafés and restaurants is one of five industries in Australia in which females outnumber males. In this industry, females make up 53.7% of the workforce although males account for the majority, nearly 60%, of full-time workers. Part-time employment accounts for nearly 47% of the industry's jobs and females make up nearly 69% of all the part-time workers in the industry.

Table 8.1: Employment ('000s) in accommodation, cafés and restaurants by sub-sector, by gender and type of employment, Australia, November 1997

Industry sub-sector	Males	Females	Full-time	Part-time	Total
Accommodation	45.6	60.6	64.1	42.1	106.2
Pubs, taverns and bars	30.9	40.5	33.8	37.6	71.4
Cafés and restaurants	76.0	87.1	83.2	79.9	163.1
Clubs (hospitality)	33.8	28.2	33.2	28.8	62.0
Total	**186.3**	**216.4**	**214.3**	**188.4**	**402.7**

Source: ABS, *Labour force*, Australia, cat.6203.0, November 1997

As noted earlier, it has been estimated that the 'hospitality' industry, more or less analogous to accommodation, cafés and restaurants, is made up of about 50% of casual employment.

[3] Australian Office of National Tourism

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The industry is a relatively important employer of persons born overseas. In November 1997, 27.7% of the industry's workforce was overseas born compared to 24% of the total workforce across all industries.

Table 8.2: Employment ('000s) in accommodation, cafés and restaurants by State/Territory, 1995

	NSW	Vic	Qld	SA	WA	Tas	NT	ACT
Males	69.1	34.5	28.5	11.4	14.7	4.8	1.6*	4.4
Females	71.3	46.2	46.4	16.6	23.1	6.0	2.3*	5.0
Total	**140.5**	**80.7**	**74.8**	**28.0**	**37.8**	**10.8**	**3.9**	**9.4**

Note: *Subject to sampling variability too high for most practical uses

Source: ABS, *Labour force*, Australia, cat.6204.0, 1995

Jobs in this industry are distributed more or less in the same proportion as total employment in Australia, although New South Wales and, to a lesser extent, Queensland have an above-average share. Victoria has relatively fewer jobs in this sector than the other States and Territories.

Table 8.3: Share of employment in accommodation, cafés and restaurants by State, by share of total jobs, 1995

State	% employed in accommodation, cafés and restaurants	% employed in all industries
NSW	36.4	33.1
Vic	20.9	25.0
Qld	19.4	18.3
SA	7.3	8.0
WA	9.8	10.1
Tas	2.8	2.4
NT	1.0	1.0
ACT	2.4	2.0
Total	**100.0**	**100.0**

Source: ABS, *Labour force*, Australia, cat.6204.0, 1995

The accommodation, cafés and restaurants industry has many characteristics in common with the retail sector. These include relatively strong employment growth over recent years, a majority of females employed, low average earnings per employee, similar average hours worked per employee per week and high levels of part-time work. The following table summarises the age distribution of those working in the industry as at November 1997.

The industry's workforce is young, although not as skewed to the younger age groups as retailing. Whereas 18.4% of the total workforce is aged under 25, in accommodation, cafés and restaurants more than 35% of the workforce is aged under 25. The following table compares the age structure of the industry with the total workforce.

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Table 8.4: Age distribution of accommodation, cafés and restaurant workers and all employed, Australia, November 1997

	Age group						Total
	15–19	20–24	25–34	35–44	45–54	55+	
Accommodation, cafés and restaurants %	13.1	22.2	22.0	20.9	14.1	7.8	100.0
All industry %	6.9	11.5	25.2	25.6	21.1	9.8	100.0

Source: ABS, *Labour force*, Australia, cat.6203.0, November 1997

Occupational composition

Some of the main occupations within the industry to have shown relatively strong growth over the last decade have been:

- *cooks*, currently numbering almost 70 000 across Australia and growing at an annual average of 3.7%
- *bar attendants*, numbering nearly 50 000 and growing at 3.4% a year
- *waiters and waitresses*, numbering about 83 000 and growing at 5.3% a year

In 1996 about 80% of those employed as waiters/waitresses and 54% of those working as bar attendants were females. A high proportion of employment in waiting is part time. In 1996 almost 73% of jobs in this occupation were part time, while 56% of bar attending jobs were part time.

The following table compares the occupational structure of the accommodation, cafés and restaurants industry with the workforce as a whole.

Table 8.5: Occupational profile, accommodation, cafés and restaurants and total workforce, Australia, November 1997

Occupation group	Accommodation, cafés and restaurants %	Total workforce %
Managers and administrators	1.0	7.6
Professionals	0.8	17.4
Associate professionals	25.1	10.5
Tradespersons and related	7.3	13.2
Advanced clerical and service	1.1	4.5
Intermediate clerical/sales/service	38.2	17.1
Intermediate production/transport	0.8	9.2
Elementary clerical/sales/service	6.3	10.5
Labourers and related	19.4	10.1
Total	**100.0**	**100.0**

Source: ABS, *Labour force*, Australia, cat.6203.0, November 1997

This sector shows some distinct characteristics in its occupational structure. Most striking are:

- a very low level of employment in the managerial and professional categories
- a correspondingly high level of employment in the 'associate professional' category, which suggests that in this sector, there is a high dependence on the VET sector for higher-level skills

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- ❖ with almost two-thirds of its workforce in the associate professional and intermediate clerical/sales/service occupations, it is very surprising that this is the industry with the lowest average labour costs
- ❖ males outnumber females almost 2:1 in the associate professional category, while females outnumber males by about the same ratio in the intermediate clerical/sales/service occupation group, indicating quite high levels of occupational gender segregation

Qualifications profile

The following table shows the qualifications held by workers in the accommodation, cafés and restaurants industry as at May 1997.

Table 8.6: Qualifications of workers in accommodation, cafés and restaurants, percentage distribution, Australia, May 1997

	Bachelor's degree or higher	Diploma/ associate diploma	Skilled vocational	Basic vocational	Without post-school qual
Accommodation, cafés and restaurants	6.4	8.9	8.3	9.6	63.4
Total industry	**17.2**	**9.0**	**12.6**	**9.4**	**49.4**

Source: ABS, *Transition from education to work*, cat.6227.0, May 1997

It is apparent from the above that the overall qualifications profile of the sector is well below the workforce average, with nearly two-thirds (63.4%) of the workforce lacking a post-school qualification. It is also noteworthy that despite the high proportion of the industry's workforce categorised as associate professionals, well above the proportion in the total workforce, this is not reflected in the qualifications held.

Only the agriculture, forestry and fishing industry has a higher proportion of its workforce (67.8%) without post-school qualifications than accommodation, cafés and restaurants.

Occupational trends and skills shortages

Over the decade between 1987 and 1996, total employment in the accommodation, cafés and restaurants sector grew by about 115 000 jobs or by 45%, making it the second fastest growing industry over that period, after property and business services. The following table shows the main occupations in the sector and their growth growth ('000s) in selected occupations in accommodation, cafés and restaurants, Australia, 1987–1996.

About two-thirds of all employers in the industry surveyed in the ESS in 1997 believed that there were sufficient VET graduates to meet current needs, while 28%, about the all-industry average, said there were not. The areas of shortage most commonly cited by those who believed there were skills shortages were in the sales and personal service category—predominantly waiters/waitresses and bar attendants.

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Table 8.7: Employment growth ('000s) in selected occupations in accommodation, cafés and restaurants, Australia, 1987–1996

	Managing supervisors	Food trades	Amenity horticulture trades	Numerical clerks	Receptionists etc.	Sales assistants	Misc. sales	Cleaners	Labourers and related	Total employment
1987	40.9	31.6	4.1	4.5	7.2	9.2	79.5	23.3	33.8	256.9
1996	54.2	49.7	4.0	7.6	11.6	15.5	117.3	29.0	49.5	371.7
Change	**13.3**	**18.1**	**–1.0**	**3.1**	**4.4**	**6.3**	**37.8**	**5.7**	**15.7**	**114.8**

Source: ABS, *Labour force, Australia*, 1987, 1996

Given the low wages paid in the sector and the high incidence of casual and part-time employment, it should not be assumed that these reported shortages are attributable to inadequate provision of training places. Shortages in the trades area was the only other significant category identified by those who believed shortages exist. The strong growth in the food trades area of 57%, almost entirely cooks and chefs, explains the frequent identification of this as an area of skills shortage. It is noteworthy that shortages were reported far more frequently in the lesser skilled occupations than in the trades area.

In the Industry Commission report cited earlier, the issue of shortages of chefs was addressed as an important issue for the industry. The commission reached the following conclusions:

> *The shortage of chefs is partly due to the increased demand from an expanding tourism industry and changing lifestyle patterns, with more people eating meals outside of the home. It is also due to the relatively large numbers of chefs leaving the industry because of demanding working conditions and low pay relative to other occupations.*
>
> *The tourism industry has experienced a shortage of chefs since the mid-1980s and probably longer. In the past, attempts have been made to address the shortage of chefs using both short-term and long-term strategies. These strategies have focussed on adding to the pool of chefs by training more apprentices and by importing chefs. The strategies have not focussed on the equally important need to reduce the number of trained people leaving the industry and for which the industry is primarily responsible.*
>
> *It is likely that a number of strategies will need to be combined to alleviate the shortage of chefs. On past experience, simply increasing the number of training places for apprentice cooks will not work. The solution lies with action to retain a higher proportion of trade-qualified cooks for longer periods; improved pay and conditions may assist. These changes are the responsibility of industry.*
>
> *One element of such a combined strategy that would require involvement from both the industry and government is the Group Training Scheme. The scheme is particularly suited to the training and retention of apprentice cooks; it exposes apprentices to the broad range of experiences that are necessary to succeed in their trade and there is some evidence that the scheme and its associated support network reduces the high rate of exits normally found among food trades apprentices.*[4]

[4] Industry Commission final report *Tourism accommodation and training*, April 1996, chapter 16

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In reporting to the Australian National Training Authority (ANTA) in 1997, the national industry training advisory body (ITAB) covering this industry, Tourism Training Australia, said:

> *The industry, through [Tourism Training Australia] TTA, has identified skill shortages in the following areas: managers, owners/operators (in all tourism and hospitality sectors)—there is a significant need within the industry for training in management and business skills. This is a long standing problem, due to many owners, operators and management staff entering the industry with little or no formal training. This area of training need is regarded as the highest priority.*
>
> *Hospitality—cooks/chefs de partie 3 and 4. There is a critical skills gap due to a long running cumulative shortage accentuated by high attrition rates. Supply and demand analysis suggests a significant shortfall, estimated to be approximately 1700 positions nationally.*
>
> *Other areas of shortfall include: all tourism and hospitality frontline staff (customer service skills); managers, trainers and staff (language and cultural skills); managers and supervisors of food preparation 4 to 6 (food safety); and retail travel staff (corporate travel).*

Hours of work and earnings

Jobs in the accommodation, cafés and restaurants industry are fairly evenly divided between full-time and part-time hours, with nearly 47% of jobs part time. This is the highest proportion of part-time employment of any industry in Australia. In overall terms, the sector has a reasonably close balance of employment between males and females. However, males predominate in full-time jobs and females in part time. Most females (almost 59%) in the industry work fewer than 30 hours per week, while nearly half (46%) of the males work 40 or more hours.

Table 8.8: Accommodation, cafés and restaurants employment, by sex and hours worked, Australia, November 1997

	Full-time ('000s)		Part-time ('000s)		Total ('000s)	
	No.	%	No.	%	No.	%
Males	127.9	59.7	58.5	31.0	186.3	46.3
Females	86.4	40.3	130.0	69.0	216.4	53.7
Total	**214.3**	**100.0**	**188.5**	**100.0**	**402.7**	**100.0**

Source: ABS, *Labour force, Australia*, cat.6203.0, 1997

Among full-time employees, male average weekly earnings for managerial workers (as at May 1996) were about $724 compared with female earnings in managerial jobs of $595. For non-managerial workers, adult male full-time weekly earnings were $563 compared with $496 for females. These were, respectively, the lowest rates across all industries for males and females.

It is noteworthy that earnings for TAFE graduates, as revealed in the 1997 TAFE GDS, showed very little variation between male and female earnings. Although there are some industries where, for females, gaining a TAFE qualification makes no impact on narrowing the earnings gap with males, in this industry female full-time TAFE graduates earned 95.3% of their male counterparts' income, one of the best results across all industry sectors. This result suggests that in this industry, VET provision is

not contributing to occupational gender segregation as it appears to do in some other industries.

Training in accommodation, cafés and restaurants

The standard collection of training statistics used by national and State/Territory training bodies does not separately identify the accommodation, cafés and restaurants industry. It does, however, identify the tourism and hospitality sector which, as noted earlier, is a larger grouping that incorporates accommodation, cafés and restaurants.

In 1996 it is estimated that tourism and hospitality received around 6.7% of total government funding for VET, or 36 hours of government-funded training for each employed person in the industry. This was above the overall industry average of 27 hours per employed person.

In 1996 module enrolments in publicly funded vocational courses in hospitality, tourism and personal services amounted to just under 8.8% of all module enrolments, or just under 7% of all 'annual hours' of training delivered. This 'discipline group' is clearly not only focussed on the accommodation, cafés and restaurants industry. However, it is one of the main industry targets for that discipline group. Females accounted for 60% of these enrolments.

Employer satisfaction with VET

The low relevance score is, nevertheless, of concern when viewed together with the result from the ESS of 1997. That survey showed accommodation, cafés and restaurant employers to be less satisfied with VET provision than employers in any other sector. On a 10-point scale, their mean overall satisfaction score with VET (which includes TAFE and private providers) was 5.7. Although the results from this measure are open to debate, this result appears significantly below the other industry sectors, whose scores were clustered in the 6.5 to 7 range (mean for all industries was 6.7%), apart from mining which recorded a second lowest 6.1. Interestingly, employer satisfaction with TAFE provision, which constitutes part of the overall VET provision, was marginally higher at 5.9 (mean for all industries was 6.6%), although this was still the lowest rating among all industries.

While State differences are generally not significant when employer responses are analysed, it must be noted that the level of employer satisfaction with VET provision was markedly lower in New South Wales than in all other States and Territories. Employers in the accommodation, cafés and restaurants sector in New South Wales gave VET a mean satisfaction score of 4.8, bringing the national average down to the 5.7 figure. All other jurisdictions recorded scores of 6.2 or better.

Graduates who were working during the final semester of their course in the accommodation, cafés and restaurants industry were less likely to receive support in their studies from their employer than those in any other industry. Only 36.8% of these received any employer support for their studies, and this was most commonly paid or

unpaid time off to attend classes. This compares to around 51% support for all industries.

VET graduates in accommodation, cafés and restaurants

The 1997 TAFE GDS found that, overall, 7% of 1996 TAFE graduates were employed in the accommodation, cafés and restaurants sector at the end of May 1997, a slight rise on the proportion employed in that industry at the 1995 survey. This made the sector the sixth largest destination by industry for TAFE graduates, out of the 17 industry sectors.

Graduates working in the sector rated their TAFE training relatively lowly on the 'relevance' scale. Of those responding to the survey, 68.5% rated their training as either highly relevant or of some relevance to their work, the third lowest rating among the 17 industry sectors. If only the 'highly relevant' category is counted, the rating moved several places up the scale, placing the sector eleventh out of 17. The overall rating of the quality of their course was, however, at about the same level as all graduates surveyed.

The single largest reason for undertaking their course of study was in order to get a job, with 31% of graduates giving this as their reason. The next most important motivator was to change jobs, with about 15% giving this as their main aim. Of those giving these as their main reasons for study, 76% said that they had either fully or partly achieved their objective.

Graduates working in the industry rated the course content as reflecting current industry practice at about the same level of all graduates, with about 73% scoring it 7 or more out of 10. They also gave a relatively high rating to their instructor's knowledge of the course content. Graduates working in the sector were also noticeably happier than most graduates surveyed about the provision of information about careers and jobs available, although still only 51% scored this 7 or more out 10, compared with all graduates surveyed, who gave only a 41% score.

Graduates gave a relatively low score to convenience of class times and venues, perhaps reflecting, in part, the difficult hours often worked in the industry. The most commonly completed qualifications for the surveyed graduates were: certificate (other), Australian Qualifications Framework (AQF) certificate II, a trade certificate or an associate diploma. The first two credentials were those which generally (i.e. across all industries) were more likely to be rated as not at all relevant.

The relatively low relevance score is probably related to the high proportion of graduates working in the industry who were working part time. At the time of the survey, almost half (49.7%) of the respondents working in accommodation, cafés and restaurants were working part time, the highest proportion working part time across all industries. Part-timers generally tended to rate their training as less relevant than those working full time, regardless of their industry.

Employment and earnings

Graduates working in the industry at the time of the survey were much more likely than the average graduate to have been unemployed at the time of graduation than were those working in most other industries. After graduation, however, they tended to find their job in the sector more quickly than did graduates working in other industries.

Graduates surveyed who were working in accommodation, cafés and restaurants recorded the lowest average weekly earnings of all graduates at $317. This low outcome was not only because of the high proportion working part time. Those working full time in the sector also recorded the lowest average weekly earnings of all industries at $436, just ahead of the next lowest, retailing, at $438. Male full-time workers averaged $448 a week while females averaged $427 per week.

This gap between male and female full-time earnings in this sector was relatively small. In all industries, full-time male earnings exceeded those of females. In some industries the gap was more than $150 per week, while in mining the difference was more than $300. Comparing part-time earnings is not possible as the actual hours worked were not available.

Apprenticeships and traineeships in accommodation, cafés and restaurants

This industry sector was the fifth largest source of apprenticeships in 1997, having shown strong growth from 1996. In 1997 there were 13 700 apprentices in the industry, up from 8800 in 1996 and only 5700 in 1995. Over the last decade the number of apprenticeships in the food trades has shown quite consistent growth, with over 16 000 apprenticeships in the occupations being in place in 1997.

The following table shows the number of food trade apprenticeships in Australia since 1987.

Table 8.9: Food trade apprentices in Australia, 1987–1997

1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997
13 150	13 937	13 815	14 282	13 945	13 917	13 503	15 205	15 125	15 586	16 269

Source: NCVER, Australian training statistics, September 1997 data collection

Traineeships in accommodation, cafés and restaurants have also grown in recent years, although quantifying the actual number is difficult. Popular areas for traineeships include a range of hospitality-related occupations.

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- The accommodation, cafés and restaurants industry appears to receive above-average government training support. However, the industry is the lowest spender on its own structured training.
- To reach the industry average for training expenditure, employers in this industry would almost need to double current training expenditure, or twice as many employers would need to provide training.
- The industry is characterised by high levels of part-time work, mainly done by women, with men grouped in the high-skill, full-time end of the industry.
- Employers are relatively dissatisfied with VET provision, although VET graduates in the industry are reasonably satisfied.

Employer support for training

The accommodation, cafés and restaurants industry accounted for 5.1% of all employers of VET graduates in the 1997 ESS. It was the industry most likely to have employed a graduate before they graduated. Of employers in the industry employing VET graduates, 66% had employed them before their graduation, compared with an average 57% of employers of all graduates.

This is a striking result when compared with the data from the GDS, showing this to be the industry offering the lowest level of employer support for students. In other words, accommodation, cafés and restaurants was more likely to employ students completing their final semester of VET studies than any other industry, but least likely to provide any support for their study.

The industry, according to the ESS, was still a relatively low user of traineeships, with only 13% of employers with employees who had undertaken a traineeship. This compared with an all-industry average of 18%. A moderately high proportion, 31%, of employers did employ persons who had completed an apprenticeship.

The ABS employer training expenditure survey for the September quarter 1996 revealed the accommodation, cafés and restaurants industry to have the lowest level of training expenditure on structured training per employee of all industries. Employers, on average, spent $54.51 per employee on training in the quarter, compared with an all-industry average of $185.49. The $54.51 actually meant that compared with three years earlier, the industry in 1996 was spending nearly $9 less per employee on training.

Over the same three-year period the actual hours spent by employers in the sector on training also declined from 2.89 hours per employee in 1993 to 2.40 hours in 1996. In 1996 the all-industry average was 4.91 hours per employee, again down from the 1993 figure of 5.5 hours.

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Only 10% of employers in the industry provided training to their employees in 1996, again the lowest level of all industries, and down from 19.2% of employers providing training in 1993. Surprisingly, total training expenditure in unadjusted dollar terms was down only marginally from $18.5 million to $18.4 million over the three years. If the accommodation, cafés and restaurants industry were to spend the all-industry average of their gross wages and salaries on training, they would need almost to double their current level of expenditure, raising it from the $18.4 to about $35 million.

In terms of hours of training effort by the industry, most time was allocated to apprentice-related training, followed by training in the personal service/clerical/sales areas. The same pattern emerged when measured in dollars per employee.

Some training issues in accommodation, cafés and restaurants

- Given the high level of persons employed at the associate professional level, why is the VET sector not providing more training at this level?
- What measures can be taken to encourage higher levels of employer support for structured training in this industry, the lowest spending sector of all?
- To what extent does the low level of training expenditure restrict the growth capacity of Australia's international tourism market?
- Will the current low skill profile occupational structure remain?
- Is the current industry skill profile comparable with international best practice?
- Although the industry is the highest employer of graduates working before graduation, it is the lowest provider of study support. What policies can be developed to stimulate greater interest in the provision of pre-graduation support?
- Are New Apprenticeships likely to meet industry needs?
- How can better industry-specific training data be collected?
- Given the age distribution of employment in the sector, it is clearly not a vestibule industry like retailing. What specific strategies can be developed to address the training needs of what is currently the second lowest credentialled workforce across all industry sectors?
- Why do shortages of skilled cooks and chefs persist? Is it directly attributable to poor industry commitment to training? Or is it a result of sometimes challenging working conditions?
- Why do such large gender differences exist in this industry in pay rates? If it reflects substantial occupational segregation, as appears likely from this analysis, what equal employment opportunity (EEO) practices are being applied in the sector? Should training policies be used by governments to attempt to reduce gender inequities?

The national industry training advisory body (ITAB), Tourism Training Australia, raised the following training research and evaluation issues with ANTA in its industry training plan in 1997:

- *a longitudinal tracking study of graduates from tertiary tourism and hospitality programs*
- *cooks' training applied research program*
- *a survey of the employment of Japanese-speaking staff*
- *a survey of caravan park operators Australia wide*
- *research into work experience requirements of VET programs*
- *a training needs analysis in regional areas of Australia*

Appendix

The following table is extracted from the ANTA resource allocations for 1997 document, available at their website. It shows the planned allocations of government-funded training between the ANTA-defined 'training areas' in terms of 'annual hours curriculum' (ACH).

Table A8.1: Key national shifts in activity between 1996 revised estimates and 1997 projected activity (ACH '000s)

Industry training area	1996 revised	1997 projected	Total increase	Total increase as % of 1996 revised	% of overall increase
Category A					
Arts, Entert, Sports and Rec	11 408	11 928	520	4.6	5.5
Automotive	8 221	8 576	355	4.3	3.7
Building and Construction	18 785	19 009	224	1.2	2.4
Comm Services, Health and Ed	20 910	22 382	1 471	7.0	15.5
Finance, Banking and Insurance	3 420	3 468	48	1.4	0.5
Food Processing	2 454	2 851	396	16.1	4.2
TCF and Furnishings	5 714	5 813	100	1.7	1.0
Communications	1 883	1 963	80	4.3	0.8
Engineering and Mining	15 654	16 607	952	6.1	10.0
Primary Industry	11 874	12 217	343	2.9	3.6
Process Manufacturing	397	479	82	20.6	0.9
Sales and Personal Service	6 527	6 752	225	3.4	2.4
Tourism and Hospitality	16 707	18 151	1 444	8.6	15.2
Transport and Storage	1 686	1 851	164	9.8	1.7
Utilities	11 898	12 145	247	2.1	2.6
Category B					
Business and Clerical	42 412	43 117	705	1.7	7.4
Computing	11 969	12 641	672	5.6	7.1
Science, Technical and Other	6 727	6 870	143	2.1	1.5
Category C					
Gen Education and Training	40 046	41 212	1 166	2.9	12.3
Unallocated	622	779	157	25.2	1.6
Total	**239 316**	**248 810**	**9 494**	**4.0**	**100.0**

Note: TCF – textiles, clothing and footwear

Source: Publications, *ANTA Resource Allocations 1997*, <www.anta.gov.au>

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Table A8.2: Employed persons by occupation in accommodation, cafés and restaurants industry, 1987 and 1996

Occupation (ASCO 4-digit)	1987 ('000s)	1996 ('000s)	Change 1987 to 1996 ('000s)	Change 1987 to 1996 Average annual %
1503 Restaurant and catering managing supervisors	15.1	18.4	3.3	2.3
1505 Accommodation and tavern managing supervisors	19.7	26.3	6.6	3.4
1599 Other managing supervisors (sales and service)	3.7	6.4	2.7	6.5
4705 Cooks	31.2	47.5	16.3	4.9
5301 Accounting clerks	4.4	7.3	2.9	6.0
5601 Receptionists and information clerks	7.0	10.3	3.3	4.5
6301 Sales assistants	9.2	15.5	6.3	6.1
6503 Bar attendants	34.9	45.3	10.4	3.0
6505 Waiters and waitresses	44.2	71.1	26.9	5.6
8301 Cleaners	23.3	29.0	5.7	2.5
8919 Kitchenhands	23.5	35.3	11.8	4.8
8999 Other labourers and related workers	2.8	4.2	1.4	4.7
Other occupations	37.9	55.1	17.2	4.4
Total all occupations	**256.9**	**371.7**	**114.8**	**4.3**

Note: As estimates of less than 3500 are subject to high statistical error, they are listed against specific occupations only where there was a higher estimate in either 1987 or 1996. Where estimates of less than 3500 were recorded for both 1987 and 1996, they are included in the 'other occupations' category

Australian Standard Classification of Occupations (ASCO)

Source: ABS, Labour force survey, unpublished data

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Table A8.3: Educational attainment of employed persons by industry, occupation (1-digit ASCO) and type of post-school qualification at 1996 Census

Accommodation, cafés and restaurants ASCO code and occupation	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
1 Managers and Administrators	1 546	548	477	976	301	3 848	656	3 993	8 497
2 Professionals	2 942	557	456	451	260	4 666	487	2 829	7 982
3 Associate Professionals	5 948	3 745	2 802	20 584	2 801	35 880	6 587	44 809	87 276
4 Tradespersons and Related Workers	655	378	530	6 719	792	9 074	1 958	19 766	30 798
5 Advanced Clerical and Service Workers	271	209	236	127	418	1 261	577	2 887	4 725
6 Intermediate Clerical, Sales and Service Workers	6 886	3 046	5 127	6 025	5 245	26 329	8 972	87 175	122 476
7 Intermediate Production and Transport Workers	222	90	121	620	158	1 211	363	3 900	5 474
8 Elementary Clerical, Sales and Service Workers	1 139	493	710	1 398	800	4 540	1 788	18 096	24 424
9 Labourers and Related Workers	1 888	759	1 010	3 296	1 391	8 344	4 693	46 915	59 952
0 Inadequately described	84	55	75	289	49	552	225	1 162	1 939
Not stated	63	25	16	119	24	247	302	1 195	1 744
Not applicable	–	–	–	–	–	–	–	–	–
Total	**21 644**	**9 905**	**11 560**	**40 604**	**12 239**	**95 952**	**26 608**	**232 727**	**355 287**

Source: ABS, 1996 Census of population and housing

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Table A8.4: Educational attainment of employed persons by industry, occupation (3-digit ASCO) and type of post-school qualification at 1996 Census

Accommodation, cafés and restaurants ASCO code and occupation	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
100 Managers and Administrators nfd	259	135	91	368	74	927	238	1510	2 675
110 Generalist Managers nfd	0	0	0	0	0	0	0	0	0
111 General Managers and Administrators	231	107	78	181	54	651	118	560	1 329
119 Miscellaneous Generalist Managers	19	7	10	94	5	135	19	82	236
120 Specialist Managers nfd	30	9	8	13	7	67	9	40	116
121 Resource Managers	480	102	140	69	54	845	97	635	1 577
122 Engineering, Distribution and Process Managers	81	37	38	80	25	261	44	272	577
123 Sales and Marketing Managers	237	90	69	67	52	515	74	496	1 085
129 Miscellaneous Specialist Managers	194	39	30	69	24	356	40	267	663
131 Farmers and Farm Managers	18	22	13	35	6	94	17	131	242
200 Professionals nfd	93	4	9	7	5	118	11	50	179
210 Science, Building and Engineering Professionals nfd	0	0	0	0	0	0	0	0	0
211 Natural and Physical Science Professionals	79	3	7	4	3	96	9	22	127
212 Building and Engineering Professionals	66	12	24	99	4	205	8	29	242
220 Business and Information Professionals nfd	0	3	3	0	0	6	0	6	12
221 Accountants, Auditors and Corporate Treasurers	495	63	138	19	24	739	75	304	1 118
222 Sales, Marketing and Advertising Professionals	146	38	33	40	40	297	54	391	742
223 Computing Professionals	109	15	21	6	11	162	14	89	265
229 Miscellaneous Business and Information Profs	211	50	55	46	37	399	50	319	768
230 Health Professionals nfd	0	0	0	0	0	0	0	0	0
231 Medical Practitioners	36	3	0	0	0	39	0	4	43
232 Nursing Professionals	111	137	4	3	27	282	31	26	339
238 Miscellaneous Health Professionals	52	10	5	0	3	70	4	11	85

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Accommodation, cafés and restaurants	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
240 Education Professionals nfd	3	0	0	0	0	3	0	3	6
241 School Teachers	309	29	19	5	3	365	9	51	425
242 University and Vocational Education Teachers	706	29	6	19	5	765	19	104	888
249 Miscellaneous Education Professionals	74	15	7	5	6	107	14	75	196
250 Social, Arts and Miscellaneous Professionals nfd	0	0	0	0	0	0	0	0	0
251 Social Welfare Professionals	124	21	34	8	16	203	23	104	330
252 Miscellaneous Social Professionals	53	0	4	3	3	63	4	16	83
253 Artists and Related Professionals	186	89	68	140	50	533	127	1 097	1 757
254 Miscellaneous Professionals	85	35	20	45	29	214	33	130	377
300 Associate Professionals nfd	38	31	32	60	23	184	36	202	422
310 Science/Engineering and Related Assoc Profs nfd	10	0	6	11	3	30	0	5	35
311 Medical and Science Technical Officers	19	5	9	27	16	76	10	46	132
312 Building/Engineering Associate Professionals	15	4	24	81	5	129	7	36	172
320 Business and Administrative Assoc Profs nfd	0	0	0	0	0	0	0	3	3
321 Finance Associate Professionals	34	3	12	6	9	64	5	66	135
329 Miscellaneous Business/Admin Assoc Profs	490	269	273	417	240	1 689	419	2 463	4 571
330 Managing Supervisors (Sales and Service) nfd	27	26	10	92	18	173	33	202	408
331 Shop Managers	428	232	163	680	173	1 676	505	4 311	6 492
332 Hospitality and Accommodation Managers	4 500	3 006	2 123	18 777	2 158	30 564	5 315	35 375	71 254
339 Miscellaneous Mngr. Supervisors (Sales and Service)	171	93	62	242	76	644	145	1 105	1 894
340 Health and Welfare Assoc Professionals nfd	0	0	0	0	0	0	0	0	0
341 Enrolled Nurses	4	6	3	0	32	45	9	8	62
342 Welfare Associate Professionals	62	18	39	12	16	147	15	88	250

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Accommodation, cafés and restaurants	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
349 Miscellaneous Health and Welfare Associate Profs	6	8	7	8	3	32	8	14	54
390 Other Associate Professionals nfd	0	0	0	0	0	0	0	0	0
391 Police Officers	0	0	0	0	0	0	0	0	0
399 Miscellaneous Associate Professionals	143	43	39	168	30	423	78	883	1 384
400 Tradespersons and Related Workers nfd	9	6	10	127	11	163	25	190	378
410 Mechanical/Fabrication Engineering Trades nfd	0	0	0	0	0	0	0	0	0
411 Mechanical Engineering Tradespersons	6	6	13	212	5	242	15	56	313
412 Fabrication Engineering Tradespersons	0	0	0	38	0	38	8	28	74
421 Automotive Tradespersons	0	3	9	185	7	204	12	44	260
431 Electrical and Electronics Trades	14	8	19	386	7	434	42	116	592
440 Construction Tradespersons nfd	0	0	0	3	0	3	0	0	3
441 Structural Construction Trades	6	5	10	369	4	394	35	124	553
442 Final Finishes Construction Trades	9	4	3	194	8	218	34	132	384
443 Plumbers	3	0	0	99	0	102	5	14	121
451 Food Tradespersons	529	263	358	2 844	497	4 491	1 454	16 099	22 044
460 Skilled Agricultural/Horticultural Workers nfd	0	0	0	0	0	0	0	0	0
461 Skilled Agricultural Workers	0	0	0	0	3	3	3	10	16
462 Horticultural Tradespersons	56	60	91	2 102	219	2 528	280	2 648	5 456
490 Other Tradespersons and Related Workers nfd	0	0	0	0	3	3	3	0	6
491 Printing Tradespersons	3	0	0	15	3	21	4	24	49
492 Wood Tradespersons	0	0	0	19	0	19	4	11	34
493 Hairdressers	0	3	0	40	3	46	3	23	72
494 Textile, Clothing and Related Trades	0	7	3	14	4	28	13	78	119
498 Miscellaneous Tradespersons and Related Wkrs	22	12	9	71	22	136	19	166	321
500 Advanced Clerical and Service Workers nfd	0	0	0	0	0	0	0	3	3
511 Secretaries and Personal Assistants	135	132	119	70	323	779	411	1 638	2 828

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Accommodation, cafés and restaurants	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
590 Other Advanced Clerical and Service Wkrs nfd	0	0	0	0	0	0	0	0	0
591 Advanced Numerical Clerks	122	67	108	30	82	409	145	1 117	1 671
599 Miscellaneous Advanced Clerical and Service Wkrs	19	10	9	27	13	78	21	131	230
600 Intermediate Clerical, Sales and Service Wkrs nfd	31	14	29	24	33	131	50	437	618
610 Intermediate Clerical Workers nfd	0	0	0	0	0	0	0	3	3
611 General Clerks	131	55	80	54	120	440	198	1 671	2 309
612 Keyboard Operators	29	27	25	9	62	152	57	356	565
613 Receptionists	485	420	562	314	539	2 320	644	4 745	7 709
614 Intermediate Numerical Clerks	168	56	117	36	87	464	141	1 025	1 630
615 Material Record and Despatch Clerks	48	36	35	71	37	227	53	551	831
619 Miscellaneous Intermediate Clerical Workers	66	19	28	28	27	168	41	290	499
621 Intermediate Sales and Related Workers	173	73	82	95	61	484	95	722	1 301
630 Intermediate Service Workers nfd	53	17	32	47	17	166	78	443	687
631 Carers and Aides	101	53	63	75	51	343	97	738	1 178
632 Hospitality Workers	5 444	2 196	3 996	5 129	4 111	20 876	7 366	75 302	103 544
639 Miscellaneous Intermediate Service Workers	159	80	78	142	99	558	152	892	1 602
700 Intermediate Production and Transport Wkrs nfd	0	0	0	4	0	4	3	40	47
710 Intermediate Plant Operators nfd	0	0	0	3	0	3	0	22	25
711 Mobile Plant Operators	8	6	0	41	7	62	10	141	213
712 Intermediate Stationary Plant Operators	34	6	15	76	15	146	17	135	298
720 Intermediate Machine Operators nfd	13	8	3	37	7	68	33	211	312
721 Intermediate Textile/Clothing/Related Mach Ops	6	0	0	8	3	17	3	69	89

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Accommodation, cafés and restaurants	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
729 Miscellaneous Intermediate Machine Operators	0	0	0	4	0	4	3	23	30
731 Road and Rail Transport Drivers	112	38	56	193	64	463	158	1 934	2 555
790 Other Intermediate Prod'n and T'port Wkrs nfd	0	0	0	0	0	0	0	3	3
791 Intermediate Mining and Construction Workers	0	0	0	5	3	8	6	19	33
799 Misc Intermediate Prod'n and Transport Wkrs	39	28	45	249	56	417	130	1 303	1 850
800 Elementary Clerical, Sales and Service Wkrs nfd	6	3	8	8	8	33	16	160	209
811 Elementary Clerks	38	31	58	34	53	214	80	811	1 105
820 Elementary Sales Workers nfd	5	0	0	3	4	12	10	102	124
821 Sales Assistants	497	185	269	512	371	1 834	889	10 030	12 753
829 Miscellaneous Elementary Sales Workers	200	98	167	142	139	746	258	2 559	3 563
831 Elementary Service Workers	392	175	207	700	225	1 699	535	4 434	6 668
900 Labourers and Related Workers nfd	14	8	14	57	14	107	54	617	778
911 Cleaners	745	349	392	1 192	627	3 305	2 097	20 421	25 823
920 Factory Labourers nfd	0	0	0	0	0	0	0	3	3
921 Process Workers	12	5	10	37	7	71	28	258	357
922 Product Packagers	5	3	4	20	7	39	21	195	255
990 Other Labourers and Related Workers nfd	0	0	0	3	3	6	3	20	29
991 Mining, Construction and Related Labourers	3	0	3	26	0	32	10	87	129
992 Agricultural and Horticultural Labourers	8	6	5	71	16	106	18	259	383
993 Elementary Food Preparation and Related Wkrs	982	326	457	1 155	607	3 527	2 161	22 311	27 999
999 Miscellaneous Labourers and Related Workers	117	61	125	735	111	1 149	302	2 746	4 197

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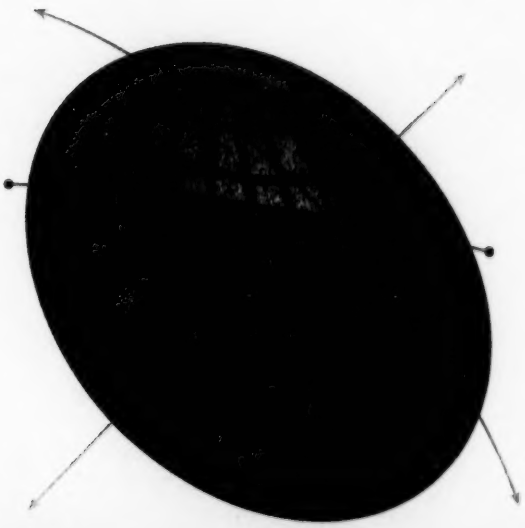
Accommodation, cafés and restaurants	Bachelor degree or higher	Undergraduate diploma	Associate diploma	Skilled vocational qualification	Basic vocational qualification	With qualifications	Inadequately described or not stated	Not applicable (no quals.)	Total
099 Inadequately described	84	55	75	289	49	552	225	1 162	1 939
Not stated	63	25	16	119	24	247	302	1 195	1 744
Not applicable	–	–	–	–	–	–	–	–	–
Total	**21 638**	**9 896**	**11 553**	**40 598**	**12 247**	**95 932**	**26 606**	**232 728**	**355 266**

Note: ntd – not further defined

Source: ABS, 1996 Census of population and housing



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